

Unifying Sales, Service & Marketing to Streamline Smart-Home Security Operations



The Customer

Trusted Smart Security for Homes and Businesses

A leading U.S. smart home security provider and part of a nationally recognized not-for-profit service federation delivers trusted security and automation solutions across residential and commercial segments, backed by a strong member network and service-driven reputation.

Impact Delivered

- 70% improvement in data quality
- 80% acceleration in sales growth
- 70% increase in operational efficiency

The Challenge

Before partnering with CriticalRiver, the company struggled with fragmented systems that led to operational bottlenecks. Their sales, service, and marketing functions were operating in silos, relying on outdated, disconnected legacy systems. This resulted in:

- Poor visibility into the sales pipeline, causing missed opportunities and inaccurate forecasting.
- Manual processes in customer service that delayed service call resolutions.
- Inefficient marketing campaigns that were not aligned with sales efforts.
- A lack of coordination across teams, leading to inconsistent data quality and reporting issues.

Solution Components

- Sales Cloud
- Service Cloud
- Marketing Cloud
- Field Service Lightning
- Salesforce Communities

The Solution

CriticalRiver stepped in to deploy a comprehensive, integrated Salesforce solution that would streamline the company's operations and deliver long-term benefits. The solution included:

- Sales Cloud: Improved sales cycle visibility provided accurate forecasting, and enhanced reporting capabilities.
- Service Cloud: Automated customer service workflows for faster case resolution and real-time insights.
- Field Service Lightning: Enabled mobile capabilities for field service teams, optimizing resource allocation.
- Marketing Cloud: Drove effective multi-channel marketing campaigns tailored to customer needs.
- Salesforce Communities: Connected customers, partners, and employees on a unified platform for seamless interactions.

The Results

With the successful implementation of Salesforce by CriticalRiver, the company is now well-positioned to lead the smart home security market. They have transformed their operations, ensuring better customer satisfaction, enhanced sales performance, and a future focused on continued growth and innovation.